IC FRAM

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Welcome to the presentation on IC FRAM – data synchronization, reports and ad hoc filters that will be helpful for you. I won't be discussing FRAM data entry, processing household applications, or anything else to deal with using Campus as your POS.

-multiple uses for free/reduced data, including the following list. Used in numerous state and federal reports. Mustn't neglect the import of the meal status to the student: links to improved student performance and fewer behavioral issues. Food insecurities are more common than actually recognized.

Agenda

- What you need to do
  - Establish a process
- How you will know it's right
  - Quality assurance checks
  - Troubleshooting
- Where to get help
  - Guides and videos

Here is our agenda. My themes will be about what you need to do – some high level items, assurance that you've done it right – quality assurance steps and where to get help if you need it. This is both a complicated and complex process but is highly important to you all. I've worked to simplify what needs to be done and highlight the areas that merit your attention.

"A well-defined process is the foundation for success."

Awesomeness begins with a plan. And your plan needs to have a good process around it. The process is a series of steps to achieve a desired end that is repeatable. You can take divergences from the process but you know why you are doing it – and what it takes to get on the main path. From this presentation I will talk a great deal about process because that is key to good data quality. And that is the end goal: data that is both accurate and complete. Both the district and KDE rely on your data for decision making and funding purposes. We want to have high confidence in your data. By building a good process you can have that assurance.

Presentation Approach

The purpose of this presentation will highlight the key milestones and tasks for ensuring accurate meal status in Campus.

Due to the complexity and details associated with the POS data synchronization and DC import into IC, please refer to the manuals (and soon to be produced videos) on the SCN technical reference website:
http://education.ky.gov/federal/SCN/Pages/Technical-Reference.aspx

I mentioned the complexity behind this process. Moreover, the timing isn't right to learn the details of setting up an import mapping or checking on a scheduled import. We'll both end up frustrated if I reach for that learning goal. I have documents and soon to be produced videos for that purpose that give screenshots and additional details on that. What I will give you is the basis for achieving success with meal status: the key areas to implement and areas to watch out for.

The website link above will be mentioned several times during this presentation and will serve as the repository for all the materials, including this presentation.

Roles and Responsibilities

- Important to clarify roles and responsibilities with your process to ensure free/reduced data is accurate and complete in IC

Major Responsibilities
  - Who will **download** the direct certification file?
  - Who shall **set up** the data synch between POS and IC?
  - Who will **check the accuracy** of free/reduced data in IC against food service POS?
  - Who will periodically **check the POS import** for success of data synchronization and resolve errors?
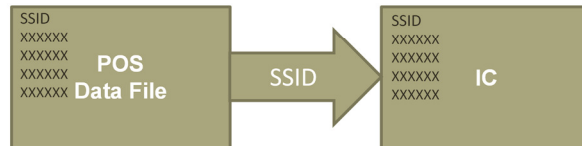 - How we will **communicate** if there is a problem?

At the outset of any project you need to determine who will be your resources – and what responsibilities they will have. Depending on your needs data synchronization and DC imports require a team approach. The following list – which is not all encompassing - shows some areas that need to be discussed. The goal is to promote ownership and avoid finger pointing. And if the workload can be shared that helps a great deal. Who does the work depends on the district. Some districts have their IT staff heavily involved and others rely on the food service director. The best approach is what works for your district. A key point is for proper set up at the beginning of year and perform regular monitoring thereafter.

Data Synchronization

Data synchronization is a dance: everything must be carefully orchestrated to work properly.

Finding the match – POS Data Synch

SSID
XXXXXX
XXXXXX
XXXXXX **POS**
XXXXXX **Data File**
XXXXXX

SSID →

SSID
XXXXXX
XXXXXX
XXXXXX **IC**
XXXXXX

The POS file is matching against what is in IC based on a *key* field. When both key fields equal each other a successful match occurs – and a meal status record is generated in Campus.

In a ballroom dance each partner knows the steps they must take: they have clearly defined roles. And when they are in synch with each other something beautiful occurs. Here is the premise of data synchronization. Two systems share data with each other based on a common field. The data transfer occurs based on a match with that common field. Between your food service POS and Campus that common field is the student state ID. Having that information in both systems allows them to communicate with each other. Using SSID is fast, simple and leads to fewer errors than other possible matching criteria.

June: Get ready!

Month of June is the end of the current school year <u>and</u> beginning of preparations for the new school year

Inspect the current school year free/reduced percentage for accuracy. DPPs should be verifying At-Risk SEEK.

(*Non-IC POS Users*) Turn off data synchronization between POS and Campus

POS system will roll over into new school year

Turn IC back on for data synchronization

The end of year and beginning of year activities coincide with each other for food service. You will want to check the accuracy of your free/reduced meal status data in IC. Is this what I expect? We'll share some good comparison data references later in the presentation. DPPs will be scrutinizing SEEK. Once you feel comfortable with your meal status data in IC you can turn off data synchronization for the current school year – and prepare for the upcoming school year.

The next step is the POS rollover, which your food service vendor will perform. Anytime after the rollover you can turn the data synchronization back on for the next school year. Starting on July 1 the food service director can begin processing household applications and then importing the DC data.

June: Get ready! – Add'l Help

PowerPoint presentations, a checklist and other helpful materials are on the SCN website under Technical Reference that provides further details

Important! Ensure that the upcoming school year is selected in the FRAM Eligibility Import Wizard.

Eligibility Import Wizard

Step 2. Name the file, enter a selection for each option and upload a file to continue.

*Name

POS Import

*School Year

14-15

Additional resource materials on setting up the POS data synchronization are on the SCN website with screenshots, etc. Just a quick reminder to ensure you choose the correct year in the FRAM eligibility import wizard when importing the meal status data – make sure you choose the school year you will be in starting July 1. Otherwise, you risk corrupting your prior school year data.

CEP Data Synchronization

Data synchronization must be adjusted depending on your CEP type

Mixed CEP Districts[1]

School	Action Required
Non-CEP	Upload both meal status and DC information (if using POS to import DC file)
CEP	Turn off data synchronization with Campus

Full CEP Districts

Action Required
Turn off the data synchronization with Campus

[1] IC POS users have a special setup; please contact Brad Blunt for details

We have over 100 districts on the Community Eligibility Provision. In this provision all students eat meals at no charge. Reimbursement is based on the percentage of directly certified students in your district. Food service does not collect household applications in this case. A HIF form is collected to obtain the socioeconomic status of students. As such you will need to turn off the data import between the POS and Campus. Shown above are the criteria based on your situation – partial or full CEP.

July and August: Hammer it!

The months of July and August are the busiest months for processing household applications for a student meal status.

➢ **Goal:** Quickly obtain meal status on as many students as possible

Key Tasks
✓ Verify POS data synchronization is working properly
✓ Run the duplicate student info under Student Information>Reports to identify duplicate student information (e.g., SSN)

During the hot days of July and August we are looking to hammer meal status within the district: get as many students a meal status for the current year as quickly as we can. And once you start processing applications we want to ensure that the meal status from the POS is transferring over to Infinite Campus. Look for errors or problems early in the school year so that you can resolve them. The scheduled import log (which we'll discuss later) is the best place to begin.

You also want to ensure that you have good household and enrollment data in Campus. For the POS import you need to have good enrollment data (no duplicate enrollment records). For DC matching ensure that no duplicate SSNs are found and that you have accurate and complete household information.

Direct Certification

Beginning in July all CEP and IC POS districts need to import the DC file into IC on a monthly basis

Important Information

✓ Perform DC imports on a regular basis at school year to identify as many DC students as quickly as you can

    ✓ Recommend weekly imports for large districts at school year beginning: new students are continually arriving

✓ Match on both SSN ***and*** SSID for the KTAP/SNAP/Medicaid file

    ✓ **Note:** Independent districts will find a lot "non-matches" due to being encompassed by a county school district

✓ If an IT person loads the file consider an Outlook rule to automatically forward the DC notification email sent from KDE to the food service contact

✓ DC Import Instructions:
http://education.ky.gov/federal/SCN/Pages/Technical-Reference.aspx

Any student on the direct certification list may receive a free meal status. For those students who are KTAP/SNAP/Medicaid the direct certification extends to all students living in the same household. To help your FSD and/or FRAM Coordinator please import the DC list as soon as possible each month. In the beginning of the school year I recommend that you import weekly as new students are enrolled. Why? We want to give them a free meal status as quickly as possible: textbook waivers, access to free breakfast/lunch, reduced bad debt for food service, etc.

Sometimes the IT staff person imports the DC file: you can set up an Outlook rule to have the DC notification email automatically sent to them, notifying them that it's ready. I will place the DC import instructions for Infinite Campus on the SCN website for your use, which is currently on the DC download website. It's a fairly straightforward process.

Impact of Student Data Quality

To perform good DC matching you need to have good quality student level data:

- No duplicate SSNs (if using SSN for DC matching)
- No duplicate enrollment records
- Household information is accurate and complete
- Follow KDE data standards on enrollment
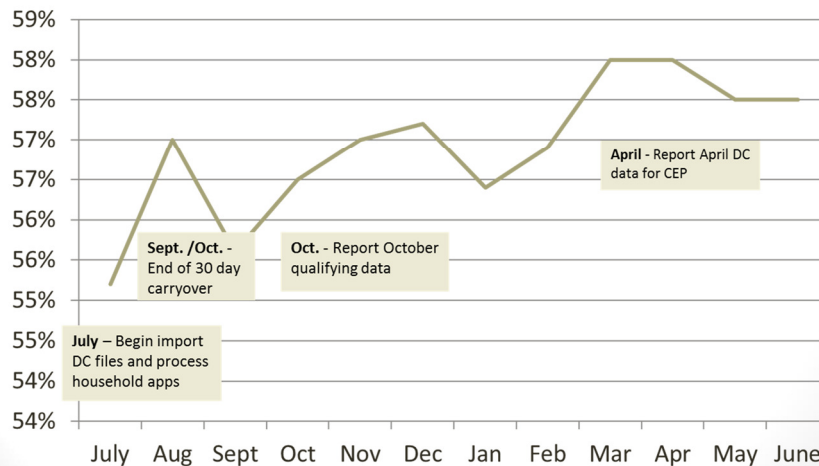
"Why would I use SSN for DC matching?"

- An SSN may be the best matching criterion. A lag exists between when an SSID is assigned and what is on the DC file. And matching on other criteria (e.g., Lname, Fname and DOB) may result in less precise matching.

Your DC matching will only be as good as the quality of your student information. If you have incorrect SSNs, missing household data and other problems you will have DC mismatches or no DC match when one should have occurred. Please search your districts for students without a household, duplicate SSNs, etc. and use the KDE data standards for enrolling students. Also, I recognize the attention given to student privacy and focus on SSNs. At this time the SSN is one of the best matching criteria for a student. Student name and DOB are simply not precise enough as the matching criteria.

As a side note, KDE has partnered with COT to develop an algorithm to match more SSIDs for students on the DC list. This accounts for difference in name spellings, DOB, etc. We also wanted to improve the accuracy – fewer instances of assigning students the incorrect SSID on the DC list due to incorrect SSN, etc. The scheduled implementation date is February 2015.

Shown here is a cycle for free meal status in a hypothetical district. You'll see it starts low here in July and gradually gets higher. My intent on this is to demonstrate it's not linear or curvilinear. You have ebb and flow within the school year. Beginning in July you'll begin importing the DC list and processing household applications. Students in attendance the prior school year will have their meal status carry forward 30 operating days into the new school year. As such you will see a dip in the free percentage as some students revert to a paid meal status. It will climb again with more DC information and the collection of more household applications. Food service reports the number of free/reduced and paid students as of October 31st to School and Community Nutrition (non-CEP schools only). In March heavy scrutiny is given to the DC list – and more students are identified as DC. By the end of the school year the free percentage has fairly stabilized.

From this cycle you gain a better understanding of how food service operates – and when to expect dips/rises in the free percentage. The magnitude is different for each district but this serves as a useful gauge. Free/reduced percentage doesn't change much – but you will see some variance.

Quality Assurance Check

"How do I know my data is correct?"

Comparison Data	Description
POS System	Most accurate and highest precision for non-CEP sites and districts
October Qualifying Data	Reports student enrollment and meal status pctg as of October 31st
Prior year meal status data	Provides a very good comparison; may not be accurate due to new schools, etc.
April DC Data	Good for CEP districts, this lists the DC numbers and total enrollment as of April 1st as reported from the POS; **CEP Districts:** as an approximation of the free meal status percentage multiply the DC percentage by a factor of 1.3

Quality is a difficult target to arrive at with the free/reduced meal status. Your POS system and Infinite Campus are not exactly aligned in most cases. POS is who you feed, and Campus is who you teach. And you can have differences between the two systems: Head Start, special services only students, etc. The goal would be to ensure that are <u>closely</u> aligned. By comparing free/reduced percentages and being able to confidently explain any minor differences you can have strong confidence that your free/reduced percentages are correct. Comparing your free/reduced percentages in Campus against an outside, external reference is the best place to start. For non-CEP schools and districts the best comparison is the POS system. Compare the free/reduced numbers from IC against the POS. And unless you've had significant economic changes in your district – then the prior year data should be close to what you have.

CEP districts have a more difficult time since household apps are not collected. They can use the prior year data as a comparison as well as multiply the DC percentage by a factor of 1.3 for an approximate estimation of the free percentage. For example, if I have 50% directly certified in my district then I might expect around 65% to be free. Your multiplier might be higher or lower – but by knowing this I can have some confidence that I'm close. A low multiplier (say 1.2) might signify that you are not collecting as many HIF forms that you could. The KDE CEP website has suggestions from districts on how to increase the return rate on the HIF forms.

FRAM Eligibility Report

Allows you to view aggregated count of meal status in IC with an option to include individual meal statuses

Key Points
- ✓ Date selected must be within the school calendar year
- ✓ Choose "Observe state exclude" to eliminate special ed only students, etc.
- ✓ Can only selected grade levels
- ✓ Report can be generated in Excel (i.e., CSV)

The FRAM Eligibility Report is your new BFF. It allows you to produce a well-designed report that shows the distribution of free, reduced and paid students in your district. Instructions on generating the report will be placed on the SCN website. It will give you a full explanation of the fields, the data parameters, etc. along with screenshots.

I wanted to make mention of a few things. The date you use to run the report must be within the first and last day of school for students. Choose to report only on schools where you collect meal status (no Job Corps, etc.) schools. You can select to include individual student level detail to see student meal status or only run the report for aggregate counts. And you can export this report to Excel for more options on sorting and formatting.

FRAM Eligibility Report

A summary of meal status is shown below

Type	Summary for Eligibility Type: Meal Free	Reduced	Paid	Total
Direct Source				
Foster	2	0	0	2
Head Start	0	0	0	0
Homeless	3	0	0	3
Medicaid	0	0	0	0
Migrant	0	0	0	0
Runaway	0	0	0	0
FDPIR	0	0	0	0
SNAP	3011	0	0	3011
TANF	0	0	0	0
Non-Direct Source				
Income	280	279	549	1108
Categorical	57	0	0	57
Override	0	0	0	0
Runaway	0	0	0	0
Foster	3	0	0	3
Migrant	0	0	0	0
Temporary/No Income	0	0	0	0
Head Start	2	0	0	2
RCCI	0	0	0	0
Early Childhood	0	0	0	0
Homeless	0	0	0	0
Declined	0	0	0	0
Denied	0	0	0	0
Did Not Apply	1	1	237	239
Socioeconomic Status	0	0	0	0
Even Start	0	0	0	0
Medicaid	0	0	0	0
	0	0	126	126
Total	3359	280	912	4551

A count of students without a meal status are located on the last row

Sch. Year	Student Name	Date of Birth	State ID	Grade	Eligibility Type	Eligibility	Source	Certified Type	School	Start Date	End Date
12-13				10	Meal	Free	Non-Direct	Income		04/08/2013	06/30/2013
12-13				05	Meal	Free	Non-Direct	Income		09/20/2012	06/30/2013
12-13				00	Meal	Paid				07/10/2012	06/30/2013

Missing meal status: Source and Certified Type are blank

Here is a screen print of the FRAM Eligibility report. The counts are located in the matrix above: how the student was certified is shown in first column – and free, reduced and paid counts follow after that. The total students enrolled on the day of the report is in the far right hand column at the bottom: 4,551. The blank line following "Medicaid" delineates the number of students without a meal status record in the current school year: this is 126 students. Their meal status will default to "Paid". In the student level detail you would see these students as Eligibility equal to "Paid" and both Source and Certified Type as blank.

FRAM Eligibility Report

A focus on free meal status is shown below:

Type	Free
Direct Source	
→ Foster	2
→ Head Start	0
Homeless	3
→ Medicaid	0
Migrant	0
Runaway	0
FDPIR	0
SNAP	3011
→ TANF	0
Non-Direct Source	
Income	280
Categorical	57
Override	0
Runaway	0
Foster	3
Migrant	0
Temporary/No Income	0
Head Start	2
RCCI	0
Early Childhood	0
Homeless	0
Declined	0
Denied	0
Did Not Apply	1
Socioeconomic Status	0
Even Start	0
Medicaid	0
	0
Total	**3359**

Observations

➢ DC Foster appears low

➢ Head Start is under non-direct

➢ Medicaid is 0

➢ TANF (*aka* KTAP) is 0

Action Items

✓ Verify POS import mapping is correct
  ✓ Values for KTAP and Medicaid s/b included
✓ Verify DC foster file is being imported
✓ Head Start students can be directly certified

On this next screen I want to focus on the details with the FRAM Eligibility report. Here is what concerns me about this district – and what I would check. I'm focusing on the free students. The report is broken out between direct source and non-direct. Starting from the top for the directly certified students I only see 2 DC foster students; that appears low given the size of the district. Secondly, I see 2 Head Start students under non-direct: these students should be direct (and we should have more of them). Medicaid is zero, which isn't right. Finally, TANF is zero – again being a problem.

I would begin by checking the POS import mapping: do I have foster, Medicaid and TANF mapped correctly? I would check with food service to ensure that the foster DC file is being imported. I would encourage them to manually check a few students marked as non-direct to ensure they shouldn't be direct. And I would note that all Head Start students can be marked as DC with a signed and dated list from the Head Start Coordinator.

The process would be: what do I expect, what do I see and what do I do to resolve that.

Troubleshooting

Here is a set of slides to assist in troubleshooting.

POS Data Synch: What could go wrong?

Shown below are common scenarios with data synchronization:

"My free/reduced percentage appears low in IC"
- ✓ Verify all values are mapped in POS import mapping
- ✓ Check when latest data synch was done under Scheduled Imports>Scheduled Import Log
- ✓ Spot check a few students without a meal status against POS

"The data synch has stopped working"
- ✓ Confirm that the username and password are correct under Scheduled Imports
- ✓ Verify that the file path/folder name has not changed
- ✓ Confirm that a file of "IC_Eligibility.txt" is being produced by the POS server

When something appears awry, here are a few areas to check for a diagnosis. I would begin with the FRAM Scheduled Import Log. Look there to see when the last synch was. If that is successful, then you can look at the POS import mapping. Use the FRAM eligibility report to narrow down what to look for. From that report you can sort it to note: when was the last meal status record synched? What values appear low that I should focus on?

A failed data synchronization points to something wrong with the communication between the POS and IC. Presuming that it's worked in the past – you want to check the configuration hasn't changed: verify the username and password are correct; the folder name for the IC_Eligibilty file is still the same, a file is being produced since the rollover, and - a new one – your IP address for the server is the same as before.

Finding the errors

Campus tracks the status of the data import from POS

- Path: FRAM > Eligibility Import Wizard > Scheduled Imports – Scheduled Import Logs

▾ FRAM
    Eligibility
    Letter Editor
    Eligibility End Date Wizard
    ▾ **Eligibility Import Wizard**
        Scheduled Imports

I want to discuss the Schedule Import Log in further detail and give you resolution steps for the common errors. Locate the scheduled import log by going to the FRAM>Eligibility Import Wizard>Scheduled Imports. You may need to ask your IC contact person in the person for rights to this tool.

Finding the errors

▸ Scheduled Import Log
  ◦ 'Successful' means the data imported in
  ◦ Review **both** 'Unsuccessful' and 'Successful' import logs to search for data import errors

Click on the task name to see the details

Click on the log file to review the data synch report

On the second tab you will click on the first entry to see the details. Then click on the latest log file to view the details. The report shows the details of the scheduled import, as shown on the next slide.

IC Eligibility Import Report

Here is the data import report from Campus. You'll see a similar report for the DC imports as well as the POS data synchronization. The concepts are the same: what was successful and unsuccessful. Scroll down the report until you see "Error/Warning" section. Focus on the errors.

For your POS import you are matching on SSID against Campus. The SSIDs must be an exact match. Any mismatch will result in an error. In the example above the preschool students have a social security number assigned to them – and they should have an SSID. They need to be enrolled in Campus. If the student has what appears to be a valid SSID and the entry of "State ID" not found appears then a discrepancy exists between Campus and your POS. Change the SSID in your POS to match what is in Campus.

Duplicate entries show as "Multiple matches" found. Merge those enrollment records in Campus. And you can generally ignore the warnings in Campus.

Resolution for Common Messages

Issue	Resolution
State ID "XXXXXXXXXX" not found	Determine student SSID in IC and then assign that SSID in POS; If student is enrolled then assign SSID to student following KDE data standards
Multiple matches found for State Student ID "XXXXXXXXXX"	Merge records in Infinite Campus following district policy on merging
Record contains End Date before Start Date	Ensure the data import mapping has the correct school year chosen in the Eligibility Import Wizard; Verify the POS data extract file is for **SY 14-15**
ERROR ##### Invalid [FieldName]	Locate the errant record: review the data import mapping to ensure all data values are mapped
WARNING XXXX	Warnings are for your info: can be viewed and generally ignored

Here is a general overview of common errors. We've discussed the state ID and multiple matches. With the end data before the start date – you are attempting to import the prior school year POS data extract into the current school year. We'll discuss the resolution steps in the next slide. With an invalid field name you have a record type (e.g., Medicaid) that is being imported from your POS system but is not included on the POS import mapping.

Corrupted Data: What do I do?

Issue: If you fail to update the school year in the FRAM Eligibility Import Wizard to reflect the current school year <u>and</u> the POS data extract file for the current school year is uploaded – the meal status data in the prior year will be corrupted.

Corrupted meal status records will show transposed dates: a start date earlier than the end date (e.g., 7/1/2014 – 6/30/2013).

Solution

1. Run the "FRAM Transposed Meal Eligibility Dates" in State Published ad hoc filters to determine the count of records.
2. Depending on the severity of the issue your options are:
   - Manually correct the records
   - Submit a support ticket to Campus to have the corrupted meal status records removed and replaced with the correct records from a backup tape: a charge may be assessed for this custom work.

Importing the prior school year meal status records into the current school year will result in corrupted data: the start date will appear after the end date. The result will be bad record in Campus. The resolution depends on the severity of the issue. With a small school district or if it's caught early then you can manually fix the records. Otherwise you can request assistance from Campus through a support ticket. They can correct the issue on the back end through running a script to remove the bad records and using a backup tape to restore the new ones.

Useful Ad Hoc Reports

Several useful ad hoc reports have been placed under the "State Published" folder in IC

- FRAM Transposed Meal Eligibility Dates
    - Locates records where the meal status data was imported into the wrong school year
- FRAM Missing Meal Eligibility Records – District
- FRAM Missing Meal Eligibility Records – School
    - High counts of missing meal eligibility records may signify a problem within the school and/or district

KDE has assembled a list of useful ad hoc reports – and placed them under the "State Published" folder in the Ad Hoc filter tool in Campus. Here are the most helpful. The transposed meal eligibility dates shows a list of students with transposed meal eligibility dates. You can then review these further. The set of filters for missing meal eligibility records list which students need a meal status record.

Resources

Technical Reference Guidance

http://education.ky.gov/federal/SCN/Pages/Technical-Reference.aspx

Campus Community

http://community.infinitecampus.com/home/

Contact Information:

Brad Blunt (brad.blunt@education.ky.gov)

Here is a list of resources. I would be available to assist you as well.